



# Trustees' Annual Report

Period: March 2020 to September 2020

## 1. Charity Name

Patrick Morgan Foundation

## 2. Charity registration number

1188297

## 3. Objectives and Activities

As set out in the governing document—the Constitution—the Patrick Morgan Foundation's objectives are to advance in life and help young people by providing support and activities which develop their skills, capacities, and capabilities to participate in society as mature and responsible individuals.

The Patrick Morgan Foundation—the Foundation—aims to eliminate the youth unemployment gap—young people from disadvantaged backgrounds are twice more likely to end up long-term NEET than their better off peers—and motivate and inspire young people to pursue the career path of their choice, regardless of their socioeconomic circumstances.

We have worked to achieve these objectives in three ways during the year we are outlining in this report:

- a) The Trustees have run **in-person workshops** to students (Year 10 to Sixth Form) at partner schools, tackling early working life topics, such as CV writing, interview preparation and etiquette, and career choice.
- b) The Foundation's **online platform** is a virtual resource, free to partner schools, that introduces students to CV writing, interview skills, and various careers, as well as pathways to follow to enter and advance through those careers. The Trustees have

worked to compile presentations, videos, and other research to make up this online platform and delivered introduction to it, support for teachers who have delivered it to students, and feedback to students after completion of these digital workshops.

- c) The Trustees have delivered **virtual talks and Q&As** to students on various topics, such as aspiration and resilience, as well as more concrete topics, such as professional services, entering other business-related careers, and the basics of working life.
- d) Raising awareness of the issues the Trustees have identified has been an area of focus for the Foundation's operations: through writing in the **press** and **social media advocacy**, the Trustees endeavor to increase attention paid to the challenges that young people from disadvantaged backgrounds face, especially in their transition from mandatory education to the working world.

Our activities are for the public benefit of increasing socio-economic diversity in the London workforce. Through supporting young people in the transition from mandatory education to employment, the Foundation introduces essential careers knowledge to pupils who would otherwise not have access to said information and provides them with direct employer interaction for better study of the working world, thus increasing the chances of a more diverse pool of graduate candidates.

All Trustees have regard of the Charity Commission's guidance on public benefit and how the Foundation works to the public benefit, meaning they:

- a) are aware of the guidance,
- b) have taken it into account when making decisions to which the guidance is relevant, and
- c) have not departed from the guidance at any point during the year reported.

#### 4. Achievements and Performance

During the first wave of the COVID crisis in the UK, the Foundation obtained a total of £11,500.00 from **private funding** bodies, namely the National Lottery Community Fund and the City Bridge Trust. This has supported performance from registration to the end of the Foundation's first financial period March to September 2020, and, along with resources from Patrick Morgan Search, has supported the following achievements, or highlights:

- a) Reached circa 200 students, through both guided and independent work on our **online platform**. By obtaining financial support from the National Lottery Community Fund and the City Bridge Trust, the Foundation developed more content for the online workshops and partnered with seven schools to offer the collection as a careers-based activity. Through interviews with professionals of various careers, the Trustees have also exposed young people to the working world via an eclectic mix of paths into popular jobs, such as medicine, law, business, and finance. Thus, the Foundation has contributed to its partner schools' pursuit of Gatsby Benchmarks, which schools can use as a framework for improving their careers provision, namely benchmarks 5 (Encounters with employers and employees) and 6 (Experiences of workplaces).
- b) Successfully delivered two (inaugural) **in-person workshop** sessions at a partner school, gathering valuable feedback in the aftermath. The Trustees led two groups of 25-30 students each in two hour-long workshops, on two different days, that tackled foundational careers skills, such as CV writing and interview skills, including preparation and etiquette. These included an aspiration-based talk by one of the Trustees to the wider group of Year 10 and 11 students at this school, which was filmed professionally to later use as promotional material and an introduction to the Foundation on the newly developed website ([p-morgan.com/foundation](http://p-morgan.com/foundation)).
- c) The Trustees have expanded their reach to the public via social media platforms and press, **advocating** for young people, their education, and their transition into the working world by signaling to persistent challenges these young people have faced, both during and after the peak of the pandemic. The Trustees have also widened the Foundation's network of MPs, alongside whom they have drafted joint letters to schools in their respective constituencies, offering the Foundation's support.
- d) The Foundation ran a **virtual work experience** programme over 15 weeks, working with a group of six Year 10 students to devise a new recruitment and onboarding project for Patrick Morgan, which entailed weekly video call meetings between the Foundation team and the students, guided research work, and exercises in oracy through regular presentations.

## 5. Financial Review

The Foundation was set up by the employees of Patrick Morgan Search Ltd., ‘the Firm.’ The Firm donates resources to the Foundation regularly, such as workspace and work equipment, which support the Foundation to carry out its activities in concordance with its charitable objectives.

The Foundation’s main source of income for this period has been private funding, a sum of £11,500.00 received from National Lottery Fund and City Bridge Trust. This funding was granted to the Foundation to facilitate the development of an online platform, a solution for lackluster careers education in disadvantaged areas during the first lockdown. Using the Foundation’s in-person workshops as reference, the online platform was introduced as a viable introduction to the working world while learning from home.

A part of the funding the Foundation received was also used towards a membership subscription for the website that hosts the online platform and for a CRM system, which the Foundation uses to keep record of all activities, key Trustee responsibilities, and maintain its network.

The Foundation also received a donation from the Firm, as well as payment for an article published in the Metro, totaling £115.00. This amount was then used for consulting services provided by the Firm.

## 6. Structure, Governance, and Management

### 6.1 Type of governing document

Constitution adopted on the 2<sup>nd</sup> of March 2020.

### 6.2 How is the charity constituted?

Charitable Incorporated Organisation (CIO).

### 6.3 Trustee selection process

In selecting individuals for appointment as appointed charity Trustees, the charity Trustees must have regard to the skills, knowledge, and experience needed for the effective

administration of the Foundation. Every Trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity Trustees where a two-thirds majority of Trustees is required to pass the resolution. At the end of a three-year term, every Trustee will be subject to re-appointment, via a resolution passed at a properly convened meeting of the charity Trustees where a two-thirds majority of Trustees is required to pass the resolution.

#### 6.4 Policies and procedures

The Foundation currently holds Safeguarding, Health & Safety and Equality & Diversity policies. Its safeguarding policy is the most significant, as the Foundation's main services are directed at young people; all Trustees must behave in a professional manner when interacting with such an audience. The Health & Safety policy aims to guarantee that all Trustees have full knowledge of how to perform their work without risk to their health and provides guidance in the event of an accident, fire, natural disaster, or other emergency. Diversity, inclusion, and equity are important values of the Foundation; the E&D policy obligates Trustees to avoid discrimination and create a safe and inclusive environment for fellow Trustees and target beneficiaries of their services.

### 7. Reference and Administrative details

#### 7.1 Charity name

Patrick Morgan Foundation

#### 7.2 Other name the charity uses

N/A

#### 7.3 Registered charity number

1188297

#### 7.4 Charity's principal address

3<sup>rd</sup> floor, Regus, The News Building  
3 London Bridge Street, London, SE1 9SG

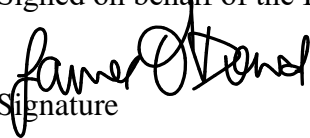
## 7.5 Charity Trustees

Name of the Charity's Trustees	
Alexandra-Marina Hercka	Charity Trustee
Angelos Andreou	Charity Trustee
Carla Meire Crocoli	Charity Trustee & Secretary
James Patrick O'Dowd	Charity Trustee & Chair
James Phillip Ransome	Charity Trustee & Treasury

## 8. Declaration

The Trustees declare that they have approved the Trustees' report above.

Signed on behalf of the Foundation's Trustees,

  
Signature

Full name: James O'Dowd

  
Signature

Full name: Carla Crocoli

Date: 27/05/2021

Charity Name <b>PATRICK MORGAN FOUNDATION</b>		No (if any) 1188297	CC16a	
Receipts and payments accounts				
For the period from	Period start date 2/3/2020	To		Period end date 9/30/2020

### Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
Grants & Donations	50	11,500	-	11,550	-
Publications	65	-	-	65	-
<b>Sub total</b> (Gross income for AR)	115	11,500	-	11,615	-
<b>A2 Asset and investment sales, (see table).</b>					
-	-	-	-	-	-
<b>Sub total</b>	-	-	-	-	-
<b>Total receipts</b>	115	11,500	-	11,615	-
<b>A3 Payments</b>					
Software subscription	-	1,420	-	1,420	-
Consulting services	100	-	-	100	-
<b>Sub total</b>	100	1,420	-	1,520	-
<b>A4 Asset and investment purchases, (see table)</b>					
-	-	-	-	-	-
<b>Sub total</b>	-	-	-	-	-
<b>Total payments</b>	100	1,420	-	1,520	-
<b>Net of receipts/(payments)</b>	15	10,080	-	10,095	-
<b>A5 Transfers between funds</b>	-	-	-	-	-
<b>A6 Cash funds last year end</b>	-	-	-	-	-
<b>Cash funds this year end</b>	15	10,080	-	10,095	-

### Section B Statement of assets and liabilities at the end of the period

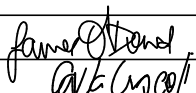
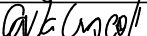
Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B1 Cash funds</b>	Cash at Bank	15	10,080	-
		-	-	-
		-	-	-
	<b>Total cash funds</b>	15	10,080	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
<b>B2 Other monetary assets</b>	Details	to nearest £	to nearest £	to nearest £
		-	-	-
		-	-	-
<b>B3 Investment assets</b>	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
<b>B4 Assets retained for the charity's own use</b>	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
<b>B5 Liabilities</b>	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
	Software montly subscription	Restricted	-	
			-	

Signed by one or two trustees  
on behalf of all the trustees

Signature

Print Name

Date of approval

	James O'Dowd	27/05/2021
	Carla Crocoli	27/05/2021